



CFA Society
Stamford

2025 Annual Review

June 2025

cfasociety.org/Stamford

President's Message



Kanna Sriskanthan, CFA

As we close out another successful Society year, I want to express my sincere appreciation for your continued engagement and support. It has been a pleasure to see so many of you at our events and programs throughout the year. Your active participation is what powers our Society and enables us to deliver meaningful content, foster professional connections, and build a strong investment community.

This year, we achieved several notable milestones that underscore the vitality and growth of our Society:

- Maintained a strong membership base of **703 members**, reflecting the strength of our local CFA community
- Welcomed **30 new CFA Charterholders**, further expanding our network of investment professionals
- Grew our digital presence with **over 500 LinkedIn followers**, extending our reach and visibility
- Supported **five local university teams** in the CFA Institute Research Challenge, championing future talent
- Celebrated a successful **23rd Annual Forecast Dinner** with nearly **200 attendees**, featuring high-caliber insights and robust dialogue
- Strengthened industry relationships by securing sponsorship from **10 distinguished organizations**

Looking ahead, I am excited about what we will accomplish together. Our focus remains on delivering relevant, high-quality programming and fostering connections that support your professional growth and success. I encourage you to stay involved, attend events, and make the most of your CFA Society Stamford membership.

Thank you for being a vital part of our community.

Warm regards,

Kanna Sriskanthan, CFA

FY25 Programming

Over the past year CFA Society Stamford hosted a combination of 17 virtual and in-person events. The Programming Committee worked to bring you the content and programs you requested — focusing on delivering programs that enhanced your knowledge, skills and professional & career development.

[Read more and view our Past Events.](#)

CFA Society Stamford Programming Events/Webinars

22 August 2024	Annual Summer Social – Crab Shell Restaurant
12 September 2024	Elections Vs. The Business Cycle – State Street Global Advisors
9 October 2024	Connecticut Foodshare - Volunteer Event
8 October 2024	Corporate Implications of the 2024 Election: Bloomberg
23 October 2024	Career Value of the CFA Charter - UConn Stamford
24 October 2024	2025 Research Challenge Kick-Off
14 November 2024	Wine Tasting Social
4 December 2024	Holiday Party/New Charterholder Ceremony
16 January 2025	Career 2025 Panel- Stamford
11 February 2025	Debunking Conventional Economic Myths
27 February 2025	Local Research Challenge – Team Competition
27 March 2025	2025 Forecast Dinner - Rockrimmon C.C.
8 April 2025	Research Challenge Semi-finals
16 April 2025	Crypto Masterclass - Grayscale
14 May 2025	How to Join a Corporate Board - Webinar
15 May 2025	Boy's & Girls Club of Stamford 5K
18 June 2025	Annual Member Meeting



**CFA Society
Stamford**

FY25 By The Numbers

703
ACTIVE MEMBERS

17 **PROGRAMMING
EVENTS**
628 **Total
Attendees**

TOP 5 EMPLOYERS

(As of May 2025)

- Bank of America Merrill Lynch
- FactSet Research Systems
- Morgan Stanley Smith Barney
- J.P. Morgan Chase
- State Street Corporation

30 **NEW**
CHARTERHOLDERS

5 **LOCAL
TEAMS**
**IN FY25 RESEARCH
CHALLENGE**

TOP 5 MEMBER OCCUPATIONS

(As of May 2025)

- Portfolio Manager
- Research Analyst, Investment Analyst
- Trader
- Financial Adviser/Planner/Wealth Management
- Investment Consultant

ANNUAL FORECAST DINNER

NEARLY
200
ATTENDEES

526
LINKEDIN FOLLOWERS



**CFA Society
Stamford**

Programming Highlights

Elections vs The Business Cycle

In September, Simona Mocuta, Chief Economist, State Street Global Advisors helped us kick-off our year at Tutti Pazzi in Stamford, presenting a US Macro Update.



61
ATTENDEES

Elections vs The Business Cycle

12 September 2024
6:00 PM – 8:00 PM
Tutti Pazzi Restaurant


GUEST SPEAKER
Simona Mocuta
Chief Economist
State Street
Global Advisors

 **CFA Society
Stamford**  **STATE STREET
SPDR**





**CFA Society
Stamford**

Programming Highlights

2025 Forecast Dinner

CFA Society Stamford's 2025 Forecast Dinner was held on March 27th. This was the 23rd year we held this premier networking event, bringing together leading investment and financial professionals in Westchester and Fairfield Counties.

This year's keynote speaker was Dr. Richard Clarida, Global Economic Advisor, PIMCO, in conversation with Paul Sweeney, Co-Host of "Bloomberg Surveillance" and "Bloomberg Markets AM."

[Read more and view a slideshow of the evening.](#)



NEARLY
200
ATTENDEES





**CFA Society
Stamford**

Programming Highlights

Creating a Competitive Advantage - Career Panel

In January 2025 we welcomed a panel of professional recruiters working across finance who shared where they see job opportunities and what successful candidates are doing to create an advantage.



51
ATTENDEES





Thanks to all for a great society year.
We look forward to seeing you soon!





**CFA Society
Stamford**

Thank You

From Your FY25 Board and Staff

OFFICERS & DIRECTORS 2024-2025

PRESIDENT: Kanna Sriskanthan, CFA

VICE PRESIDENT & UNIVERSITY RELATIONS CHAIR: Victoria Konstantinova, CFA

VICE PRESIDENT & TREASURER: Tim Van Hooser, CFA

SECRETARY & VOLUNTEER ENGAGEMENT CHAIR: George Rimakis, CFA

CANDIDATE ENGAGEMENT CHAIR: Amy Bibb, CFA

PROGRAMMING CO-CHAIR: Robin Wells, CFA

PROGRAMMING CO-CHAIR: Tom Collimore, CFA

MEMBERSHIP ENGAGEMENT CHAIR: Donna Matheson, CFA

PARTNERSHIPS CHAIR: Jeff Kalapos, CFA

EXECUTIVE DIRECTOR: Margaret Kelleher



**CFA Society
Stamford**

Our 2025 Partners

Thank you to our distinguished financial supporters for
their on-going partnership with our Society.

LEADERSHIP CIRCLE SPONSORS

CARLYLE GRAYSCALE[®]



PREMIER SPONSOR



**JACK WELCH COLLEGE
OF BUSINESS & TECHNOLOGY**
Sacred Heart University

GOLD SPONSOR



SILVER SPONSORS



ARTISAN PARTNERS



**FOCUS
PARTNERS** | WEALTH

P I M C O

J.P.Morgan
Asset Management

VanEck[®]